

**FRESNO, CALIFORNIA
CLASS SPECIFICATION**

RETIREMENT COUNSELOR

FLSA STATUS:

Non-Exempt

CLASS SUMMARY:

The Retirement Counselor is the first and entry level in a two level Retirement Counselor series. Incumbents perform a variety of duties in the areas of counseling of retirement benefits and options, disability retirement, and retiree payroll.

The Retirement Counselor is distinguished from the Retirement Specialist, which is responsible for performing journey level retirement counseling services to employees.

TYPICAL CLASS ESSENTIAL DUTIES: (These duties are a representative sample; position assignments may vary.)

**FRE-
QUENCY**

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|----|---|-----------------|
| 1. | Assists in verifying benefit eligibility and preparing estimates of benefits payable; counsel's members and their beneficiaries on benefit options, service purchases, service and disability retirement, Deferred Retirement Option Program (DROP), Post Retirement Supplemental Benefit (PRSB) program, and death benefits. | Daily
50% |
| 2. | Responds to a variety of routine retirement benefit questions for active, deferred, and retired members, explaining various options so members can make informed retirement planning choices. | Daily
20% |
| 3. | Receives, processes, and prepares a variety of forms, documents, and related information related to retirees. | Daily
10% |
| 4. | Prepares and maintains retiree records regarding benefits, insurance, and deductions. | Daily
5% |
| 5. | Assists in preparing presentations and speaking before groups of members to explain benefits. | Bi-Weekly
5% |
| 6. | Researches and compiles data and information associated with retiree benefits and prepares related reports detailing findings and recommendations. | Monthly
10% |
| 7. | Performs other duties of a similar nature or level. | As
Required |

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Training and Experience (positions in this class typically require):

- Fifteen semester units of accredited college level course work in Business Administration, Public Administration, or a related field and two years of technical level experience in a retirement, insurance, or government benefit program, or in a personnel system that involves retirement benefit experience are required;

OR

- An equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

Licensing Requirements (positions in this class typically require):

Some positions, based on assignment, may require:

- Basic Class C license.

Knowledge (position requirements at entry):

Knowledge of:

- Basic components of pension systems
- Basic components of disability programs
- Basic components of death/survivor benefits
- Applicable Federal, State and Local laws, codes, ordinances, policies, procedures, rules and regulations
- Research methods
- Accounting principles, practices and methods
- Statistical analysis, theories and concepts
- Data collection and analysis techniques

Skills (position requirements at entry):

Skill in:

- Using computers and applicable software applications
- Prepare and proofread clear, concise, and comprehensive reports, records, and other written documents
- Preparing and giving presentations
- Interpreting, applying, and explaining applicable laws, codes, ordinances, policies, procedures, rules and regulations
- Applying independent judgment, personal discretion, and resourcefulness in interpreting and applying guidelines
- Gathering, assembling, analyzing, and evaluating facts and evidence to draw logical conclusions and make appropriate recommendations
- Assisting in the administration of retirement programs
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, business/organizations, elected and appointed officials, etc. sufficient to exchange or convey information and give and/or receive work direction

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Physical Requirements:

Positions in this class typically require: feeling, finger dexterity, grasping, hearing, and repetitive motions, seeing and talking.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects including one's own body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met. Some positions may require more frequent walking, lifting and standing.

Note:

The above job specification is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.

Classification History:

Draft prepared by Fox Lawson & Associates (LM)

Date: 12/2007

Reviewed by the City of Fresno

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